



SOUTHEAST ASIA SESSION

# MOVING FROM INTEREST TO DELIVERY

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By Dr Ming Tan



# ONE REGION, DIFFERENT PATHWAYS

## Myanmar

**Early-stage nuclear cooperation**

Regulatory and policy development



PWR

## VIETNAM

**Rapid demand growth**

Programme development



## PHILIPPINES

**Energy security and affordability**

Owner's capability and supply chain



SMR



PWR

## THAILAND

**Energy diversification**

Regulatory and policy development



SMR

## MALAYSIA

**Future energy mix**

Institutional readiness



SMR



PWR

## SINGAPORE

**Decarbonisation and resilience**

Technology assessment and capability building



SMR

## INDONESIA

**Energy security and industrial growth**

Regulatory and programme capability



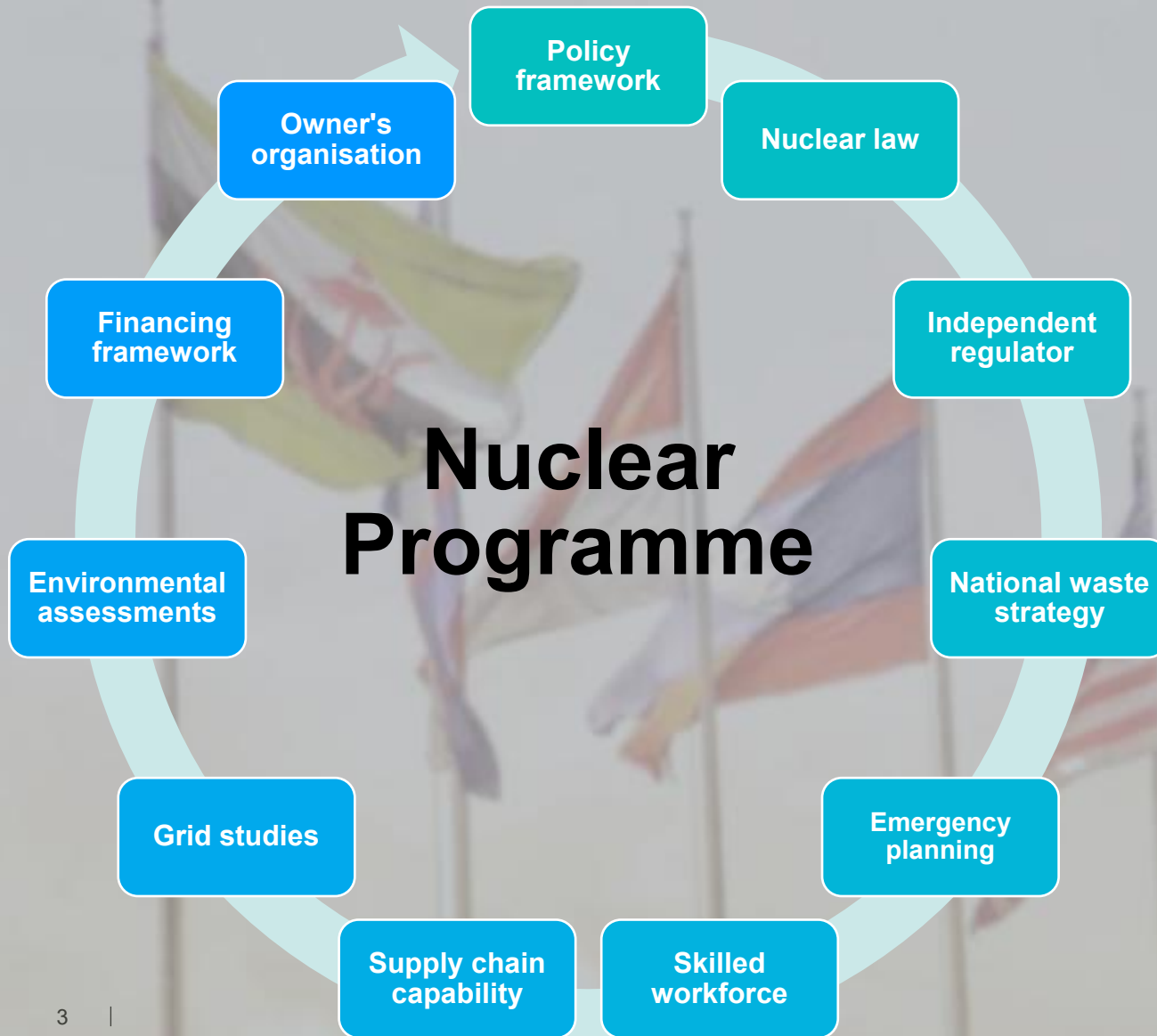
PWR



SMR

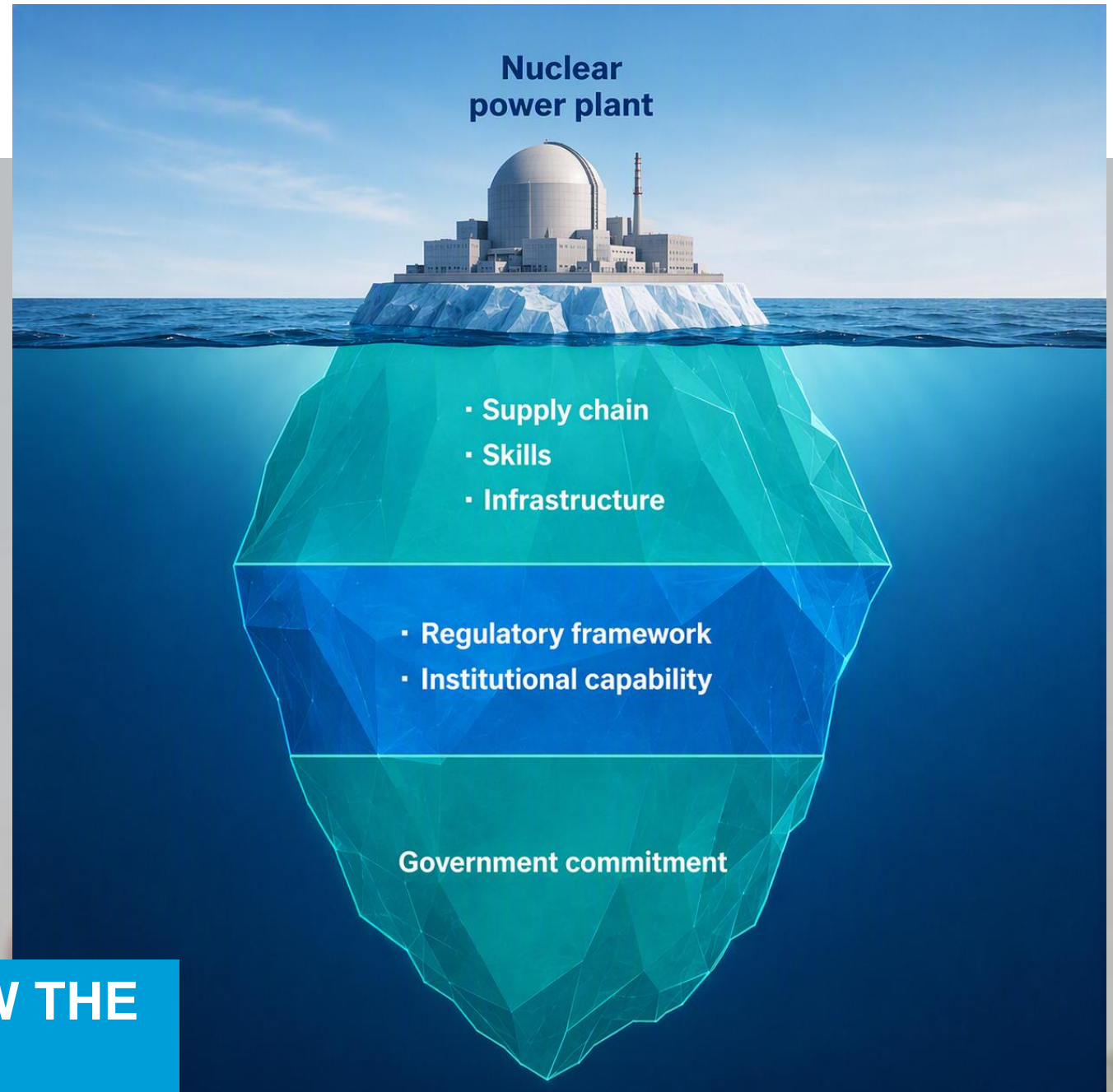
Several Southeast Asian countries are progressing nuclear ambitions, but each is starting from a very different baseline.

# NUCLEAR IS NOT A REACTOR PROJECT. IT IS A NATIONAL PROGRAMME.



**For newcomer countries, establishing these capabilities can take years and requires coordinated support across multiple disciplines.**

# WHAT MUST BE BUILT



**MOST OF THE EFFORT SITS BELOW THE REACTOR.**

# BUILDING THE ECOSYSTEM CREATES OPPORTUNITIES

- **Legal and commercial framework**
- **Financial, economic and insurance**
- **Regulatory and institutional**
- **Technical and licensing**
- **Infrastructure and programme delivery**
- **Workforce and supply chain**

**The opportunity is not confined to reactor technology. It lies in creating the complete ecosystem required for deployment.**

# Common regional challenges



# SUCCESS REQUIRES LOCAL UNDERSTANDING

**International Expertise + Local Capability = Successful Delivery**

- **Credible local entities and partners**
- **Local workforce development and knowledge transfer**
- **Understanding business culture**
- **Understanding government and institutional decision-making**
- **In-country presence and long-term commitment**

# THREE TAKEAWAYS

## 1. A region of distinct national pathways

Southeast Asia is not one nuclear market. Each country begins from a different baseline.

## 2. The opportunity is much broader than the reactor

Legal, financial, regulatory, institutional, technical and delivery capability must all mature.

## 3. Global experience must become local capability

Long-term success depends on trusted local entities, knowledge transfer and national ownership.



**Different pathways. Shared challenges. Significant opportunity for trusted, long-term partners.**



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# Our Panellists

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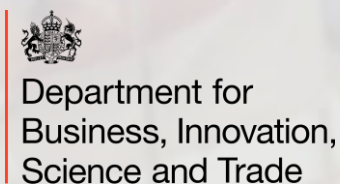
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